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SPANISH USA

A Study of the Hispanic Market in the United States

■ origins ■ characteristics and life-style ■ marketing and media behavior

Conducted by
YANKELOVICH, SKELLY & WHITE, INC.
for
THE SIN NATIONAL SPANISH TELEVISION NETWORK

June, 1981

YANKELOVICH,
SKELLY AND
WHITE, INC.

Dear Reader;

A few months ago we were commissioned to carry out a challenging and unique assignment: to define the character of the U.S. Hispanic population and examine its true value as a market. When SIN requested the study, we realized that it was probably the first of its kind. Today we still feel that to be true.

Our study examines the U.S. Hispanic population in total as well as focusing on the four major subgroups: Mexicans, Puerto Ricans, Cubans and Other Hispanics. It accomplishes that while covering issues from migration history to specific marketplace attitudes and behaviour. It also briefly describes the cultural background and diversity of this growing population and finally, the current importance of Spanish language media in general and Spanish language Television specifically.

We are sure that you'll find this research useful in the design of marketing plans directed toward this unique and increasingly important segment of the U.S. population.

Sincerely,

Daniel Yankelovich
Chairman

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SUMMARY OF FINDINGS

Profile of U.S. Hispanics

An overall picture of Hispanic America includes these basic and compelling facts:

There are approximately 15 million people of Hispanic background or descent living in the United States.

More than 6 in 10 Hispanic-American adults were born outside of the United States.

90% of the adult population speak Spanish and 43% speak "only enough English to get by."

Almost half consider themselves "Hispanic first, American second." Of the remainder, almost all say "Hispanic and American equally."

Some interesting differences among the four subgroups are apparent, however. Each has its own migration history, level of acculturation, etc. Moreover, two different basic orientations toward living in the United States are also apparent:

Two of the subgroups appear to feel "separated" from their countries of origin. The Mexican and Cubans, for different reasons, share a similar commitment to living in the United States. They are not likely to say they try to visit their home countries or want to live there permanently even "if economic and political situations permitted." These two groups are the most likely to own their United States homes/apartments.

In contrast, the **Puerto Ricans and other Hispanics appear to want to retain more of a "visitor" status.** They visit their home countries periodically and, if and when economics/politics permit, most wish to return there to live permanently. These two groups are unlikely to own their United States place of residence.

Individual profiles of each of the subgroups can be summarized as follows:

The **Mexicans** are the largest and the most assimilated of all the groups, accounting for 60% of all Hispanic-Americans; approximately 9 million in total. Their long history of immigration is apparent, as they are the only group with a large proportion of adults born inside the United States (53%). While there are many older, less educated, and/or non-English-speaking Mexicans, the high United States born percentage is reflected in this subgroup's high level of bilingualism (60%) and socioeconomic status ($16,300 annual household income). Assimilation notwithstanding, Mexicans are reluctant to forsake their Hispanic indentity. Half consider themselves "Hispanic and American equally," the remainder say "Hispanic first."

Cubans emerge as a well educated, older, almost "aristocratic" group. Exiled here for political reasons almost 20 years ago, Cubans strive to retain their heritage. Cubans have the highest average household income ($21,300 annually) and the highest proportion employed in white collar occupations (38%, not including clerical workers). Then, too, only 40% of the Cubans are bilingual and, more than any other group, 74% consider themselves "Hispanic first." Cubans account for 7% of the total Hispanic-American population; approximately 1.05 million people. Half of this group reside in Florida and 26% live in the New York City area.

Puerto Ricans represent 15% of all Hispanic-Americans (about 2.25 million people) and reside principally in the Northeast urban corridor and most specifically in New York City. Most appear to be "workers stationed abroad," although a majority of the adults have been here 15 to 20 years and, as a result, 60% are bilingual. However, remarkably few were born in the United States (18%), and the vast majority intend to return to Puerto Rico to live permanently. This suggests immigration to the United States as young adults, a stay for economic reasons, and retirement in Puerto Rico. However, in terms of economic fortunes, Puerto Ricans fare least well of all the groups. They are the least educated and least likely to have two wage earners in a household. Many are employed as unskilled operatives. The average annual household income is $11,400; lowest of all four groups.

The **Other Hispanics** are the most recent immigrants: almost two-thirds came to this country within the past ten years. They account for 18% of all Hispanics (about 2.7 million people overall) and reside primarily in California (53%) and New York City (29%). The Other Hispanics are disproportionately young and single. Few speak English (40%). However, they are well educated and well trained workers, and, if married, are most likely to have two wage earners in the household. As a result, they have a high household income of $16,100 annually.

Hispanics as Consumers

The background migration and socioeconomic differences among the four subgroups dissolve considerably when it comes to their attitudes and practices as American consumers. That is, **the majority of all the groups evidence:**

"Traditional" American values regarding a belief in upward mobility, emphasis on materialism and the accumulation of wealth, etc. They are more likely than Americans as a whole to express "the American Dream."

Many newer values regarding individualism, physical fitness and attractiveness, nonconformity, etc.

An orientation toward family and sex roles which is not unlike most Americans. While they are more likely to associate the role of "provider" with masculinity, this does not extend to making "the important decisions for the family." Moreover, Hispanics are like most Americans when it comes to encouraging careers for women and balancing the needs of the individual with those of the family.

A greater interest than most Americans in "quality" products and in name/nationally advertised brands. Moreover, Hispanic-Americans are much more likely to say that "once I find a brand I like I stick with it."

A belief on their own part that they are a valuable market target. They spontaneously cite their preoccupation with "quality" and "name brand" products. Moreover, 7 in 10 Hispanics maintain that only "some" companies recognize the value of the Hispanic market and 54% go on to say they "can tell which companies" these are.

These findings, plus the **fact that almost 30% of Hispanic households earn $20,000 or more annually, suggest that Hispanic-Americans are an attractive target and potentially responsive to marketing efforts.**

The Spanish Language: Key Way to Reach Hispanics

Many factors indicate that Spanish-language media are an excellent way to reach Hispanic-Americans.

At this time, a substantial proportion of them know only Spanish or are culturally linked to the language. This has been true, of course, of other immigrant groups in their own times. However, the Spanish language may have more "staying power" because of continued immigration to, and a more felicitious environment in, the U.S.

Almost half of the Hispanic-American population know "only enough English to get by." The remainder are bilingual (only 10% know English only or primarily).

Hispanic-Americans are ardent in their desire to preserve their ethnic identity and traditions. As noted, most consider themselves "Hispanic first, American second." Further:

Nine in ten say it is important to "pass on to our children a sense of belonging to our religious and national tradition."

Nine in ten say "Hispanics are demanding respect for and recognition of our culture more than we used to." Interestingly, 6 in 10 believe Hispanics are getting this respect "more and more every day."

Virtually all Hispanic-Americans believe the Spanish language is the aspect of their tradition that is most important to preserve. Further, more than 6 in 10 say that having Spanish-language media is "extremely" or "very important to me personally:" this even includes those who are bilingual, half of whom place such importance on having Spanish-language media.

Approximately 7 in 10 Hispanics watch, listen to, or read Spanish language media every week. In fact, half of the Hispanic-Americans report using Spanish media **primarily** — that is, 50% or more of the time they spend with any given media.

Most do perceive English media to be superior in terms of "modernity" and "professionalism."

Yet, Spanish-language media are highly relevant to Hispanic-Americans. The "language is easy to understand" and these media "understand the kind of life I lead."

Perceptions and Usage of Spanish Language Media

Spanish-language television is used more than any other type of Spanish-language media.

Overall, 70% of all Hispanic-Americans report watching Spanish-language television each week. On average, adult Hispanics report spending nearly 20 hours weekly watching television, about half watching Spanish language stations.

Hispanics report listening to radio fifteen hours each week on average, eight of which are Spanish-language.

Hispanics devote six and a half hours each week to reading newspapers and magazines, less than half of which is spent with Spanish-language print.

Spending the most time watching Spanish-language television are "heavy users" of television in general (i.e., older women) and non-English speaking Hispanics (i.e., Cubans and Other Hispanics). However, **watching Spanish television 50% or more of the time they watch TV are:**

48% of the women.
45% of the men.
37% of the affluent Hispanic households (earning $20,000 or more annually).
37% of Hispanics 16 to 29 years old.
51% of those 30 to 49 years old.

PRINCIPAL STUDY FINDINGS

Migration History

Mexicans
Steady influx over many years . . . concentrated in Southwest . . . 53% born here . . . Have old segment / early immigrants, plus, **many young adults,** United States born . . . large families.

Largest segment of all:
60% of Hispanics, 9 million people

Cubans
Influx 15 to 20 years ago . . . concentrated in Southeast . . . only 7% born here. It's the oldest group / "aristocracy," few children.

7 % of all Hispanics: 1.05 million people

Puerto Ricans
Heavy influx 25 years ago . . . concentrated in Northeast / New York City . . . Only 18% born here . . . immigrants now in middle age, with young children, United States born.

15% of all Hispanics: 2.25 million people

Other Hispanics
Most recent immigrants: 1970's . . . dispersed geographically . . . Only 7% born here . . . most **young adults** / foreign born, few children.

18% of all Hispanics: 2.7 million people

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total Population
Where Born						
In United States	37	18	53	7	7	—
Outside United States	63	82	47	93	93	—
	(100%)	(100%)	(100%)	(100%)	(100%)	
How long in United States						
— Under 10 years	38	18	36	20	63	—
— 10-19 years	33	35	18	58	30	—
— 20 or more years	29	47	46	22	7	—
Region						
California	31	8	32	13	53	—
Texas	28	—	46	—	3	—
New York City	17	66	—	26	29	—
New Mexico, Arizona, Colorado	10	—	15	1	3	—
Florida	6	3	1	53	9	—
Chicago	6	12	6	2	1	—
Philadelphia, Washington, D.C.	2	11	—	5	2	—
Age						
Under 30 years	42	30	50	21	38	32
30-49 years	36	46	28	44	49	34
50 years or more	22	24	22	35	13	34
Average	36.5	38.4	35.9	43.2	34.3	40.9
Marital Status						
Married	60	55	61	68	59	65
Single (never married)	27	24	27	17	32	16
Divorced / separated	9	11	8	10	8	7
Widow(er)	4	5	4	4	2	12
Unmarried couple living together	1	4	—	—	—	NA
Average number of household members	4.0	3.7	4.4	3.4	3.4	2.8

Bilingualism

90% of U.S Hispanics speak Spanish — 43% speak **only** Spanish, or just enough English to "get by."

Question:
Which statement best describes your current language ability?

	Hispanics						
						Where Born	
	Total	Puerto Rico	Mexico	Cuba	Other	In U.S.	Outside U.S.
	%	%	%	%	%	%	%
Know **Spanish only**	23	19	19	19	39	4	34
Know Spanish and enough English to get by	20	21	17	33	22	8	27
Bilingual	47	50	50	42	34	65	35
Know English and enough Spanish to get by	9	9	12	5	4	19	4
Know **English only**	1	1	2	1	1	4	—

National Allegiance

Puerto Ricans and Other Hispanics

Most tied to home country:

. . . 60% "Hispanic first"

. . . 75% visit home country often

. . . 60% wish to return to live

Note: Neither **owns** United States home

Mexicans

Retain "dual citizenship", 52% say "Hispanic and American Equally". Many try to visit Mexico, but few wish to return to live.

Cubans

"Stranded" in host country. 74% "Hispanic **first,**" yet, can't visit home and few even wish to return to live.

Question:
Which statement best describes your feelings?
(Aided)

	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
	%	%	%	%	%
Hispanic first, American second	46	55	34	74	66
Equally Hispanic and American	42	34	52	20	22
American first, Hispanic second	12	11	14	6	12
Percent Who "Agree" or "Agree Strongly" with Statement:					
I try to visit my home country every few years	60	75	56	25	78
If the economic and political situation permits, I'd like to return to my home country some day to live permanently	37	60	23	39	65
Tenure					
Rent home/apartment	54	79	45	39	72
Own home/apartment	46	21	55	61	28

SOCIOECONOMICS

Mexicans
$16,300 annual income, **55% home owners.** Many craftsmen, some white collar, but: 14% laborers, still poorly educated, however "striving" young adults.

Puerto Ricans
$11,400 annual income, 21% home owners. Unskilled operatives, least educated, 12% unemployment, few "dual wage" earners.

Cubans
$21,300 annual income. 61% home owners. **Many white collar** owners/proprietors, highly educated, "dual wage" earners.

Other Hispanics
$16,100 annual income. 28% homeowners. Well-educated, but speak Spanish only, are young/students, craftsmen.

	Hispanics					United States
Percentage of Population	Total %	Puerto Rico %	Mexico %	Cuba %	Other %	Total %
Education:						
Eighth grade or less	31	36	32	18	21	8
1-3 years high school	30	27	32	28	28	20
High school graduate	24	29	20	31	34	35
Some college	12	7	14	12	10	18
College graduate	3	1	2	11	7	19
Annual Family Income						
Under $10,000	38	52	38	15	35	28
$10,000-19,999	34	40	32	38	35	32
$20,000 or more	28	8	30	47	30	40
Average annual family income	15.9	11.4	16.3	21.3	16.1	18.2
Tenure						
Rent home/apartment	54	79	45	39	72	31
Own home/apartment	46	21	55	61	28	69
Occupational Status of Respondent						
Work full-time	47	42	43	65	58	46
Work part-time	5	3	6	3	5	10
Currently unemployed	8	11	8	4	10	4
Retired	9	11	9	11	5	13
Student	8	5	8	6	10	11
Housewife	23	28	26	11	12	16

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Occupation Type	%	%	%	%	%	%
Professional/manager	6	3	7	13	8	26
Proprietors/owners	3	2	2	12	4	4
Sales	8	9	7	12	6	7
Clerical	13	12	13	19	13	14
Craftsmen/foremen	17	9	16	12	21	16
Operatives	21	37	17	10	23	14
Laborers	8	1	13	3	1	7
Personal service workers	12	14	11	17	12	8
Other	3	—	4	1	4	3
Refused	9	13	10	1	8	1
Occupational Status of Head of Household						
Employed full or part-time	71	55	74	81	67	74
Currently unemployed	7	12	6	2	8	3
Retired	10	12	11	9	6	16
Student	1	2	—	1	2	3
Housewife	3	8	2	—	5	3
Refused	8	11	6	6	12	1
Occupation Type						
Professional/manager	8	5	9	15	8	29
Proprietors/owners	4	2	3	13	6	6
Sales	11	13	11	10	5	6
Clerical	11	14	10	14	13	8
Craftsmen/foreman	20	10	21	13	27	22
Operatives	23	34	23	11	22	16
Laborers	9	1	12	3	2	6
Personal service workers	14	21	11	21	17	7
Incidence of "dual wage earners" in married households	24	10	24	30	34	25
Which of These Types of Credit Cards Do You Yourself Use? (Aided)						
Department store	28	22	32	43	17	42
VISA/BankAmericard	16	19	11	39	19	30
Gasoline company	13	5	15	19	8	25
Master Card	12	13	9	37	12	30
American Express	5	4	3	17	4	10
Airline credit	4	5	4	3	1	3
Car rental	3	4	3	1	3	3
Telephone	3	8	2	1	2	8
Diners Club	1	1	—	2	2	3
Carte Blanche	—	—	—	3	1	3

HISPANICS AS CONSUMERS

Consumer issues bring four subgroups together (it's why they came here). Hispanics share key values/beliefs:

- Upward Mobility
- Life Styles
- Consumer Orientations
- Self-image in the Market

Upward Mobility

More likely than Anglos to espouse traditional "American" values. Optimistic regarding improved standard of living, materialism/tangibles, deferred gratification. Also more likely to evidence "frustration" despair, less pleasure from work.

Life-Styles

As likely as Anglos to express new values. Attitude towards family, nonconformity, individualism, physical attractiveness, physical fitness, interest in "change".

Sex Roles

More likely to see **man as "provider".** However, open to **careers for women,** man not necessarily **the** decision-maker.

Life-Styles

Percent who Agree/Strongly Agree with Statements	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Optimism in Improved Standard of Living						
It is becoming harder to be optimistic that our standard of living in the future is going to be better than it is now	61	67	58	60	66	77
Pleasure from Work						
I don't expect to get much pleasure from my work. Work is just what you do to earn a living	41	46	37	35	52	24
Materialism/Tangibles						
I prefer to spend money on tangible things that I can keep rather than on things that give me temporary enjoyment like a vacation and so on	61	75	55	51	74	48
Live for Today						
I try to have as much fun as I can now and let the future take care of itself	36	29	36	29	41	47
Feelings of Despair						
I often feel there is nothing in this world worth striving for	24	27	22	12	37	16
Interest in Change						
I need to satisfy my hunger for new experiences	62	55	61	65	68	62
Physical Attractiveness						
I need to keep up with the new styles	49	51	42	69	64	46
Physical Fitness						
We are all getting soft; it is more important today than ever to take special measures to maintain our health	86	92	85	79	86	90

Percent who Agree / Strongly Agree with Statements	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Individualism						
People should be free to look, dress and live the way they want to whether others like it or not						
1. Fits me very well	47	50	42	47	55	43
2. Fits me pretty well	33	24	35	39	33	31
3. All right for others	14	12	17	10	8	17
4. Don't approve at all	6	14	6	4	4	9
Nonconformity						
Many people are puzzled by the changing values of this country. They feel it's difficult to know whether something that is wrong today will still be wrong a year from now. Other people are not at all influenced by changing values; they have their own long-standing personal standards of right and wrong to guide them						
1. Puzzled by changing values	28	45	25	35	30	27
2. Uncertain	25	30	23	37	21	16
3. Guided by personal standards	47	25	52	28	49	57
Attitude Toward Family						
There should be less emphasis on family togetherness and more on the individual						
1. Fits me very well	14	11	10	9	31	13
2. Fits me pretty well	19	20	19	13	23	19
3. All right for others	23	21	23	44	14	24
4. Don't approve at all	44	48	48	34	32	44
Attitude Toward Sex Roles						
Being Masculine Means:						
A good provider to his wife and family	55	67	57	58	37	36
Someone you can depend on in times of need	15	10	17	13	12	23
Just a person who happens to have born a male rather than a female	9	6	9	7	11	18
A leader, not a follower	5	4	3	3	12	10
Sexually attractive to women	3	1	—	4	12	9
Makes the important decisions for the family	10	9	11	12	7	4
Careers for Women						
Suppose a married woman with children wants to work and is able to handle her home and family while pursuing a career. How do you feel about it?						
Such a woman should definitely be given the opportunity to have a career	48	46	49	56	45	48
Even if she wants to and can work, a woman with children and home responsibilities should only consider part-time work while her children are in school	29	30	29	15	30	35
Unless the extra money is needed, a woman with children should not have an outside job, even if she wants one	23	24	22	26	25	17

Consumer Orientations

The U.S. Hispanic population is more likely than Anglos to:
- —Stress product **quality**
- —Value **name or advertised brands**
- —Be **brand loyal,** yet, at the same time, seem **receptive to new products**

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Percent who Agree/Strongly Agree						
I'm paying more attention to how long a product lasts in relation to its price	80	82	79	80	82	65
The biggest, most popular brands are the best	39	44	35	38	48	22
Frequently food products and beverages sold under a store's own brand name are better than the well-known nationally advertised brands	39	38	37	30	49	64
Once I find a brand I like, I stick with it	82	91	79	94	82	57

Stocking Economizing Behavior

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Percent Holding Down Costs by:						
Compare food prices more carefully	78	90	78	83	66	69
Stock up when I find a good bargain	55	57	56	44	51	63
Buy economy-size packages	51	56	51	56	42	35
Fewer snack foods	41	54	38	30	43	47
Buy store brands	35	46	33	27	38	48
Cooking from scratch	35	40	36	31	31	31
Serve less at family meals	7	7	7	8	8	9

New Product Openness

Question:
Some people have told us that they are constantly searching for new ways to do things while others have said once they find something they like, they stay with it. For which of these activities are you, yourself, looking for a new way of doing things? (Aided)

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Percent who say they seek:						
New foods to eat at home	64	77	61	59	68	47
New TV programs to watch	62	65	63	61	54	56
New supermarkets to shop in	58	65	54	64	64	15
New department stores to shop in	54	49	55	58	53	27
New magazines to read	40	32	40	53	39	30
New household cleaning products to use	36	30	40	28	34	14
New places to go for vacation	36	41	34	33	39	39
New laundry products to use	30	31	30	27	30	10
New types of liquor to drink	16	17	13	16	26	7
New kinds of beer to drink	10	17	7	5	18	9
New kinds of cocktails to drink	10	8	10	6	13	6
New brands of cigarettes to smoke	4	6	3	2	10	5

Upscale Ownership/Activity

	Hispanics					United States
	Total	Puerto Rico	Mexico	Cuba	Other	Total
Luxury Product Ownership (Percent who own):						
Color TV	83	82	83	94	80	83
Stereo equipment	71	81	66	83	73	63
Sewing machine	50	42	54	63	38	57
Tape recorder	47	46	42	62	60	51
TV video game	11	4	13	20	7	18

Self-Image As A Market

Hispanics believe they are a good market for products and services.

"Quality conscious" cited as often as **size** of population . . . believe that **only "some" companies recognize** them currently and **"you can tell which ones they are."**

Question: **In your own opinion, what is it about you and other Hispanics that makes you a good market for products and services?**	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Principal factors cited (percentage of)					
— Quality-oriented consumers (net)*	53	77	40	72	69
— Quality conscious	38	53	25	55	59
— Buy name brands/advertised products	28	57	20	32	31
— Not price conscious/willing to spend	17	29	10	29	28
Large/increasing size of the Hispanic population	52	71	45	82	50
Buy/use a lot of products	38	42	35	48	40
Earn more money/increasingly affluent	25	34	20	26	34

* "Net" is the total who mentioned one or more of the items listed/indented immediately below.

Question: **In general, how would you describe business' attitude toward Hispanic consumers of goods and services?** (Aided)	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percentage agreeing with:					
Most companies **still don't recognize** the value of Hispanic consumers	29	34	29	28	24
Some companies **now recognize** the value of Hispanic consumers	41	39	39	32	54
Most companies **now recognize** the value of Hispanic consumers	20	20	24	15	13
All companies **recognize** the value of Hispanic consumers	10	7	9	24	9
Statement: **You Can Tell Which Companies Really Appreciate and Understand the Hispanic Consumer** ("Agree" or "strongly agree" with statement)	54	45	51	79	63

Note: No comparable data on the total United States population exists for these issues.

SPANISH LANGUAGE

For **practical** and **"symbolic"** reasons, Spanish language is a key way to reach Hispanics. **Intense desire to preserve cultural identity.** Across time: Focus on children and elders. Across space: Visits to home country. "Hispanic **first.**"

Language is the most important aspect to preserve. Language **"bond" between four groups:** 60% say significant differences exist, but, 70% say language is strong common bond.

Key role for **Spanish language.** Necessity: only half are bilingual; **symbolic:** Other traditions follow.

Perceived Differences Between Hispanic Groups

Question: **All things considered, how big are the differences between Hispanic groups — Cuban, Puerto Rican, Mexican, Chicano, etc?** (Aided)	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percent who Perceive Degrees of Difference					
Great deal of difference	27	19	30	26	24
Some important differences	34	35	35	24	32
Minor differences only	20	19	17	28	31
Little difference	19	26	18	22	13
Question: In which areas do these groups have significant differences?					
Percent citing following differences:					
Spanish language how used, spoken	42	36	45	37	38
Preferences in music, song	35	32	36	32	33
Preferences in foods, beverages	30	32	27	33	37
Holidays, celebrations	26	24	27	23	28
Preferences in art, literature	24	21	22	34	31
Job opportunities	24	27	24	23	23
Attitudes toward family	22	19	24	20	16
Religion, beliefs	19	22	20	15	16
Statement: Because of Language, There is a Strong Common Bond					
Percent who Agree / strongly agree	70	76	66	81	74

Desire to Preserve Cultural Identity

(Aided)

	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percent who Agree/Strongly Agree with Statement					
We should pass on to our children a sense of belonging to our religious and national tradition	89	95	88	93	88
Hispanics are demanding respect for and recognition of their culture more than we used to	87	85	87	92	86
Anglo-Americans respect the Spanish people and their traditions more and more every day	62	67	56	77	74

Question:
Which aspects of Hispanic culture and traditions do you feel are most important to preserve? (Unaided)

	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percent citing:					
Aspects of Culture/Traditions Most Important to Preserve					
—The language/Spanish-language	81	83	77	95	88
—Care/respect for elders (net)	58	75	50	83	61
—Respect for elders/parents	53	69	46	76	57
—Care for elders/older people stay with family	43	51	40	57	44
Music/songs	54	55	53	48	60
Religion/church	51	67	45	55	57
Family/commitment to family	50	64	44	59	56
Art/literature	48	52	42	61	61
Foods/beverages	46	52	42	48	52
Love for life/know how to enjoy life/happy people	42	49	39	44	44
Holidays/celebrations	41	48	38	49	41

Importance of Spanish Language Media

Question:
How important is it to you personally to be able to have *Spanish language* radio stations, television stations, and newspapers and magazines? Why is it so important to you personally to have *Spanish language* radio, magazines, television, etc? (Unaided)

		Hispanics			
	Total	Puerto Rico	Mexico	Cuba	Other
Percent who say Spanish Language Media is "Extremely"/"Very Important"	63	68	61	73	63
Reasons Why Important:					
Language (net)[1]	86	88	85	93	87
— Practical reasons	61	55	59	72	68
— Keeps language alive	50	58	46	68	52
Traditions/teach traditions (net)	56	69	49	67	64
— Keeps traditions alive	42	48	37	53	49
— Teach children	43	62	37	49	44
Deserve our own media	35	39	33	41	35
Have different interest from Anglos/prefer different things	27	28	27	26	25

[1] "Net" is the total who mentioned one or more of the items listed/indented immediately below.

PERCEPTIONS & USE OF SPANISH LANGUAGE MEDIA

English and Spanish Media

English media has its "place" and is stiff competition, because of its perceived quality and professionalism. Nonetheless, **7 in 10** Hispanics watch, listen to, or read Spanish media every week. **Half use Spanish media primarily** (i.e., 50% or more of time). **Language need is key; "understand the kind of life I lead."**

Differences Within Spanish Media

Spanish television used more than other Spanish media. Radio a close second. Print a distant third. Key advantages of Spanish television are: Language easy to understand for entertainment value, subject matter and impact of advertising.

Hours Spent With The Three Media*

Hispanics by National Group	Total	Puerto Rico	Mexico	Cuba	Other
	No.	No.	No.	No.	No.
Average Number of Hours, Minutes Per Week					
Spanish TV	9:36	9:30	8:36	10:36	11:42
Anglo TV	9:54	9:06	11:48	6:30	6:36
	19:30				
Spanish radio	7:48	7:18	8:00	7:36	7:54
Anglo radio	7:06	6:30	7:54	5:06	5:30
	14:54				
Spanish print	2:54	3:18	2:18	4:36	3:12
Anglo print	3:36	3:42	4:06	3:18	2:24
	6:30				

Hispanics by Income Group	Total	Total Family Income: Under $10,000	$10,000-$19,999	$20,000 or More
	%	%	%	%
	100	38	34	28
		(100%)	(100%)	(100%)
Average Number of Hours, Minutes Per Week				
Spanish TV	9:36	10:54	9:48	7:30
Anglo TV	9:54	10:12	9:06	9:30
Spanish radio	7:48	8:48	8:42	6:24
Anglo radio	7:06	6:18	6:54	8:12
Spanish print	2:54	2:30	3:00	2:06
Anglo print	3:36	3:24	3:18	3:24

*Adults 18 years of age or older.

Usage of Spanish Language TV

	Hispanics				
	Total*	Puerto Rico	Mexico	Cuba	Other
Percent of Respondents who:					
Do not watch TV at all	1	2	1	—	2
Watch English TV, only	31	21	38	16	15
Watch Spanish TV, 1%-49% of time	22	26	25	19	14
Watch Spanish TV, 50%-74% of time	22	25	18	29	28
Watch Spanish TV, 75%-99% of time	7	19	3	7	12
Watch Spanish TV, only	17	7	15	29	29
Of time spent watching TV, average percentage in Spanish	48.0	50.5	41.0	61.0	62.8

* Total includes only the 93% of respondents who reported availability of Spanish-language TV in their area.

Usage of Spanish Language Radio

	Hispanics				
	Total*	Puerto Rico	Mexico	Cuba	Other
Percent of Respondents who:					
Do not listen to radio at all	5	5	5	5	4
Listen to English radio only	20	16	25	12	16
Listen to Spanish radio 1% to 49% of time	23	25	24	18	15
Listen to Spanish radio 50%-74% of time	16	14	13	24	25
Listen to Spanish radio 75%-99% of time	11	10	13	7	7
Listen to Spanish radio only	25	30	20	34	33
Of time spent listening to radio, average percentage in Spanish	50.0	52.3	46.3	58.2	57.2

Usage of Spanish Language Newspapers/Magazines

	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percent of Respondents who:					
Do not read print at all	16	16	19	5	7
Read English print only	31	21	40	16	16
Read Spanish print 1%-49% of time	16	20	14	19	16
Read Spanish print 50%-74% of time	9	11	5	20	20
Read Spanish print 75%-99% of time	5	10	4	2	6
Read Spanish print only	23	22	18	38	35
Of time spent reading newspapers/magazines, average percentage in Spanish	41.5	46.1	33.1	56.0	56.8

Media Perceptions

(Aided)

Spanish vs. English media

Question:
There are a number of things people have said they consider when evaluating a newspaper, magazine, radio or television station. Please tell me how, in general, you would describe Spanish language newspapers, magazines, radio and television stations on each characteristic.

	Hispanics				
	Total	Puerto Rico	Mexico	Cuba	Other
Percent who say of Spanish media:					
The language is easy to understand	67	67	63	86	75
A really pleasurable pastime	44	42	42	52	49
Modern and up-to-date	42	29	44	46	41
Deals with subjects of interest to people like me	38	39	35	54	44
Honest and truthful	37	33	35	46	44
Understand the kind of life I lead	33	29	31	45	42
Advertisements for products I'm interested in	33	30	29	43	43
High quality, professional job	31	24	29	40	40
Advertising which captures my attention	29	24	28	36	35

Question:
How would you rate English language newspapers, magazines, radio and television?

Percent who say of English media:					
The language is easy to understand	50	54	57	28	33
A really pleasurable pastime	47	47	48	35	51
Modern and up-to-date	61	64	62	58	60
Deals with subjects of interest to people like me	49	45	53	35	41
Honest and truthful	35	38	34	41	32
Understand the kind of life I lead	28	28	28	21	29
Advertisements for products I'm interested in	40	37	44	34	33
High quality, professional job	54	59	51	55	62
Advertising which captures my attention	40	37	44	34	33

Perceptions of Three Spanish Language Media Types

(Aided)

Spanish Language TV

Question:
There are a number of things people have said they consider when evaluating a television station. Please tell me how, in general, you would describe *Spanish language* television stations on each characteristic.

	Total	Hispanics			
		Puerto Rico	Mexico	Cuba	Other
Percent who say of Spanish TV:					
The language is easy to understand	65	70	63	77	60
A really pleasurable pastime	45	39	44	51	51
Deals with subjects of interest to people like me	42	41	37	62	50
Modern and up-to-date	39	26	42	45	38
High quality, professional job	35	22	35	44	43
Honest and truthful	35	29	31	46	48
Advertising which captures my attention	32	19	31	48	39
Understand the kind of life I lead	29	24	25	47	39
Advertisements for products I'm interested in	28	29	26	46	30

Spanish Language Radio

Question:
There are a number of things people have said they consider when evaluating a radio station. Please tell me how, in general, you would describe *Spanish language* radio stations on each characteristic.

	Total	Hispanics			
		Puerto Rico	Mexico	Cuba	Other
Percent who say of Spanish Radio:					
The language is easy to understand	66	71	64	77	63
A really pleasurable pastime	42	48	40	55	40
Deals with subjects of interest to people like me	38	40	36	57	34
Modern and up-to-date	41	37	44	53	31
High quality, professional job	38	35	38	45	39
Honest and truthful	35	34	33	45	36
Advertising which captures my attention	29	29	29	45	22
Understand the kind of life I lead	29	29	27	52	28
Advertisements for products I'm interested in	29	30	29	43	25

Spanish Language Newspapers/Magazines

Question:
There are a number of things people have said they consider when evaluating a newspaper or magazine. Please tell me how, in general, you would describe *Spanish language* newspapers or magazines on each characteristic.

	Total	Hispanics			
		Puerto Rico	Mexico	Cuba	Other
Percent who say of Spanish Newspapers/Magazines:					
The language is easy to understand	57	61	53	78	61
A really pleasurable pastime	34	32	32	52	32
Deals with subjects of interest to people like me	29	25	26	56	31
Modern and up-to-date	33	26	35	51	25
High quality, professional job	26	22	25	44	28
Honest and truthful	30	26	28	43	32
Advertising which captures my attention	25	15	28	42	18
Understand the kind of life I lead	25	21	22	52	27
Advertisements for products I'm interested in	24	22	24	40	20

Profile of Spanish-Speaking TV Viewers

The heaviest users of Spanish television are non-English speaking Hispanics, Cubans and Other Hispanics. "Heavy users" of television in general are women, older, downscale. However, using **Spanish TV 50% or more of the time they watch TV are:** 48% of the women, 45% of the men, 37% of the affluent households ($20,000 or more), 37% of those under 30 years old, and 51% of those between 30-49 years.

		Spanish TV Viewing*			
	Total	No Spanish	1%-49% Spanish	50%-75% Spanish	76%-100% Spanish
	%	%	%	%	%
	100	32	22	22	24
Viewing by Demographic Group					
Ethnic Background					
Puerto Rican		23	26	25	26
Mexican		39	25	18	18
Cuban		16	19	29	36
Other		17	14	28	41
Total Family Income					
Less than $10,000		23	20	24	33
$10,000-19,999		32	23	22	23
$20,000 or more		36	27	19	18
Sex					
Male		31	24	27	18
Female		29	23	17	31
Age					
Under 30 years		40	23	21	16
30-49		24	25	28	23
50 years or older		21	19	17	43
Language Ability					
Spanish		11	15	24	50
Bilingual		43	30	21	6
Where Born					
United States		53	28	14	5
Outside United States		16	21	27	36

*In areas where Spanish-language TV is available.

Note: This table is percentaged horizontally.

	Total	Lightest 21%	Next 21%	Next 17%	Next 21%	Heaviest 20%
Viewing Quintiles						
Total Hours Per Week Viewing TV		0-7	8-14	15-20	21-29	30+
Proportion Spent with Spanish-Language TV						
None: English TV only	32	40	24	20	22	38
1-49% Spanish	22	16	22	26	27	24
50-74%	22	26	32	31	10	12
75-100% Spanish	24	8	22	23	41	27
Average proportion of total TV viewing spent with Spanish-language television	48	42	44	51	61	42

Attitude Toward TV Advertising in Spanish

More than 7 in 10 Hispanics cite "English ads that were just adapted for Hispanics." Many resent such a "slight," which is taken as an ethnic slur. Can affect opinion of product advertised. Particularly "militant" are Puerto Ricans and Other Hispanics.

Question: **Some people have told us that they can tell if an ad has been made especially for Spanish television and the Hispanic audience or if it is an English ad that has just been adapted for Spanish TV. Have you ever noticed such a difference.**		Hispanics			
	Total	**Puerto Rico**	**Mexico**	**Cuba**	**Other**
Percent who Have Noticed English Ads Adapted for Spanish TV:	73	87	71	83	64

Statement: People have different reactions to ads on Spanish TV that seem to be an English ad that has just been adapted for Spanish-speaking people. As I read the letter of a reaction, please tell me whether you **strongly agree, agree, disagree,** or **disagree strongly.**					
Percent who Strongly Agree/Agree with Statement					
They must think Hispanics aren't very intelligent	54	77	47	28	68
As an Hispanic, I feel personally offended	47	81	33	27	65
They don't care about Hispanic consumers	41	42	43	32	36

Adds to more than 100% due to multiple responses

STUDY DESIGN

Timing

The study was conducted between September, 1980 and April, 1981.

The Sample

To meet the study purpose, the research was designed to reflect accurately the total Hispanic-American population and also to permit broad analysis of each of the four subgroups. Overall, a national probability sample was developed and, then, disproportionate sampling procedures followed in order to yield approximately 150 respondents in each of the subgroups. This approach provided both analytic flexibility and, since each subgroup could be restored to true proportion, a meaningful "total." More specifically (and outlined in this section), the sample was constructed systematically in terms of market, household, and specific respondent.

A number of sources were consulted — United States Census Updates, primarily — to assess the market-by-market distribution of Hispanics, overall, and each of the four subgroups, specifically.

The proportions of each "ethnic group" in each of the top 30 Spanish markets in 1980 were identified.

This market-by-market picture highlighted the high concentration of Puerto Ricans in the New York City area and Mexicans in Los Angeles. Therefore, for the purpose of better dispersion of interviews, it was decided to undersample by 50% the New York Puerto Ricans and the Los Angeles Mexicans.

Thereafter, within each of the four strata (Puerto Rican, Mexican, Cuban, and Other Hispanics) twenty cluster frames with eight interviews per cluster were selected by a systematic random method (yielding a total of 80 clusters of 8 interviews each).

These systematic procedures indicated that interviewing be conducted in 19 of the 30 largest Hispanic markets. The markets in which the interviews took place were:

New York, New York
Philadelphia, Pennsylvania
Chicago, Illinois
Miami, Florida
Tampa/St. Petersburg, Florida
Washington, District of Columbia
Corpus Christi, Texas
Dallas, Texas
El Paso, Texas
Houston, Texas
McAllen-Brownsville, Texas
San Antonio, Texas
Phoenix, Arizona
Denver, Colorado
Albuquerque, New Mexico
Fresno, California
Los Angeles, California
Sacramento-Stockton, California
San Francisco, California

To select households, starting points were determined in each market according to the 80-cluster sample plan. While these points were selected based on known concentrations of Hispanics, no formal quota assignments were made. Instead, field work was closely monitored to see if, in fact, the desired number of interviews with each of the four groups would, in this "natural way," be obtained. As the field work progressed, it became apparent that Other Hispanics, and, but to a lesser degree, Cubans would not be obtained completely in this way. In these instances, local government agencies and ethnic organizations were contacted to help locate these households.

Eligibility was based on self-designation in accordance with the method employed by the 1980 United States Census. Accordingly, all respondents were of acknowledged "Hispanic descent or background."

Within eligible households, the following procedures were observed to select the appropriate respondent:

The names of all household members **sixteen years of age or older** were gathered:

Males first, females second.
Names were listed alphabetically by first name within sex.

From household to household the first then the last person listed was interviewed alternatively. If the selected respondent was not at home, two call backs were made.

Only one individual per household was interviewed.

These procedures yielded the following sample.

A total 646 interviews were completed with:
144 Puerto Rican-Americans
156 Mexican-Americans
147 Cuban-Americans
199 Other Hispanic-Americans, including people from Central America (e.g., El Salvador, Guatemala, Nicaragua, Panama, Costa Rica, Dominican Republic, etc.); South America (e.g., Colombia, Peru, Argentina, Equador, Bolivia, Chile, Uruguay, etc.); Spain and the Philippines.
All respondents are 16 years of age or older.
Fifty percent male, 50% female.
The interviews lasted from 45 minutes to one hour.

As had been built into the survey design, statistical weighting procedures were used in computer tabulations to restore the sample to true proportions:

The New York and Los Angeles samples were restored to their true proportions.

All four ethnic groups were then aligned into their true proportions.

These procedures produced a data base which conforms very well to normative census data as shown on the following table.

STUDY SAMPLE VS. U.S. CENSUS

	Study Sample	United States Census*
	%	%
Total	100	100
Sample Description:		
Ethnic Group		
Puerto Rican	15	15
Mexican	60	60
Cuban	7	7
Other	18	18
Annual Household Income		
Under $10,000	36	38
$10,000-14,999	18	20
$15,000-24,999	26	24
$25,000 or over	14	12
No answer	6	6
Education		
Less than high school	60	59
Four years of high school	24	25
One or more years of college	15	15
No answer	1	1
Sex		
Male	49	49
Female	51	51
Age		
16-24 years	30	29
25-34 years	25	25
35-44 years	18	18
45-54 years	12	13
55 years and older	15	15
Marital Status		
Married	60	60
Single	31	31
Divorced/widowed	9	9

*Census Series P-20, issued March, 1979, for all data except income. Income data is based on Census data (P-20) issued October, 1979, and has been adjusted slightly to reflect known trends.

METHODOLOGY

The Questionnaire

Several steps were taken in the development of the survey questionnaire. Initially, information was gathered from three sources:

An extensive **literature search** was conducted. Reviewed were United States Census Updates, articles in periodicals of all types, and books about the Hispanic population in the United States. Additionally, recent survey investigations of the total United States population were consulted; comparisons on key issues between Hispanics and the total population would provide important perspective in evaluating the survey results.

Three group interviews were conducted with Hispanic consumers. This effort provided guidance regarding effective lines of inquiry and an awareness of important linguistic considerations. Each group consisted of ten to twelve people, half were male and half female. Each session reflected a different Hispanic subgroup and was conducted in markets where concentrations were known to exist, as follows:

Puerto Ricans in New York City, New York
Mexicans in Los Angeles, California
Cubans and Other Hispanics in Miami, Florida.

Fifty-four in-depth interviews were conducted with advertising executives. These professionals were employed at advertising agencies and corporations, some currently targeting on the Hispanic market and some who are not. Respondents were probed regarding what questions and issues they felt should be addressed in the research.

Based on the information gathered, a first draft of the survey questionnaire was prepared. Yankelovich, Skelly and White, Inc. worked with translators to produce a translation which was both sensitive to the issues and, yet, phrased in a Spanish relatively free of idiom which has currency among Hispanics regardless of specific national background. This questionnaire was pretested in Spanish with respondents from each of the four subgroups. Interviewers were debriefed and their suggestions solicited. Revisions were then made in both Spanish and English versions of the questionnaire.

The Field Work

Interviewers were selected to match respondents ethnically and were briefed extensively before the survey began. Additionally:

All field work was conducted during prescribed day-parts, including an extensive amount of nighttime interviewing.

All interviews were conducted in the homes of respondents.

Interviewers offered respondents a choice of conducting the interview in Spanish or English. The final results of this procedure:

177 interviews (or 27% of the total) were conducted in English
469 interviews (or 73% of the total) were conducted in Spanish.

Interviews lasted from 45 minutes to one hour, on average.

Method of Analysis

All interviews were validated, edited, coded, and computer tabulated by Yankelovich, Skelly and White, Inc. It can be noted that the analysis was guided by two basic objectives:

To provide a concise and accurate description of the Hispanic population.

The data were examined in aggregate and in terms of ethnic subgroup, total family income, sex, place of birth (in or outside of the United States), age, and television viewing habits. Correlations and patterns in attitudes and behavior were noted carefully. The information was then "synthesized" into the themes and facts found to be most important in describing, detailing, and understanding the Hispanic community.

To provide a meaningful perspective from which to evaluate and appreciate the information.

Comparable information on the total United States population was assembled. A variety of sources were consulted, including Census Updates, trade/industry reports, and survey data compiled recently in investigations conducted by Yankelovich, Skelly and White, Inc. This information highlighted similarities and differences between the Hispanic community and the population as a whole.